

# **Annual Town Election**

**Monday, April 3, 2023**

**Candidates  
Packet**

Cheryl C.A. Estrella, CMC  
Town Clerk



**Office of the Town Clerk**  
3 North Main St. / PO Box 438  
Assonet, MA 02702  
[www.FreetownMA.gov](http://www.FreetownMA.gov)  
508-644-2201  
[townclerk@freetownma.gov](mailto:townclerk@freetownma.gov)

*“The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; who spends himself in a worthy cause; who at the best knows in the end the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, so that his place shall never be with those cold and timid souls who neither know victory nor defeat.”*

*-Theodore Roosevelt, “The Man in the Arena” (1910)*

Congratulations! You have taken a courageous step by declaring your candidacy for elected office. For any government to work effectively, especially your local Town Government, it requires the active participation of its citizens. Democracy functions best when the citizenry is given a choice. The Office of the Town Clerk thanks you for your active participation and wishes you the best of luck in your campaign.

The Office of the Town Clerk is here to assist you as you navigate through the local election process. A Candidates Packet is available on the Town’s website that provides the following:

- Running for Office in Freetown – Quick Checklist
- Election Calendar
- Positions on Ballot / Terms Due to Expire
- Statement of Candidacy
- Campaign Finance Materials
- Political Sign Policy

I again extend my gratitude to you for placing yourself “in the arena”, and if you have any questions, please do not hesitate to contact me.

Best of luck!

Cheryl C.A. Estrella, CMC  
Town Clerk

## Check List for Running for Office in the Town of Freetown

*"A Candidate's Guide to Running for Town Election"*

- ✓ Review List of **Terms Due to Expire** for listing of positions available on this year's ballot.
- ✓ Review **Annual Town Election Calendar/Key Dates to Remember**.  
Note the last day to obtain and submit nomination papers.
- ✓ Obtain **Nomination Papers**. Circulate for signatures. Be sure to submit more than the required number of signatures (50 signatures for Regional School District Committee positions, 40 for all other positions) for certification so you do not fall short in the event of signatures not certified. All signatures must be legible and written substantially as registered. The law allows a voter to insert or omit a middle name or initial and still have the signature deemed valid. Do not use nicknames or initials in place of full names. Married women should sign "Helen Smith" not "Mrs. John Smith"
- ✓ **Campaign Finance Activity**  
State law requires an accounting of all money received or spent in the course of a political campaign. Candidates are required to submit regular campaign finance reports and to comply with the campaign finance laws and procedures. It is the responsibility of all those participating in political campaign financing in Massachusetts to become knowledgeable with the provisions of the campaign finance law and its regulations. Violations of the law carry serious penalties of fines, imprisonment, or both.

Your candidate packets include the following Campaign Finance Related materials:

- Campaign Finance Guide
- CPF M102 Campaign Finance Report & Instructions
- No Financial Activity Form CPF M102 – 0
- Common Errors Made Fact Sheet
- Public Employees and Campaigns Fact Sheet
- Memo regarding personal contributions

- ✓ **Political Signs**  
It is recommended by the Building Commissioner for the Town of Freetown, that political signs only be placed on private property with the permission of the property owner and that they be out of the right of way, and not obstruct vehicle or pedestrian traffic. In accordance with Article 11.20D, Section 5b of the Town of Freetown's General & Zoning By-Laws, political signs must be removed within 7 days after the election.  
  
MGL c.87 §9 allows for a fine of fifty dollars for affixing a notice, sign advertisement or other thing to a tree in a public way without obtaining written permission from the Tree Warden or Highway Department in the case of a state highway.  
  
MGL c.266 §126 allows for not less than ten nor more than one hundred dollars, plus the cost of removing such defacement for posting banners, announcements, notices or signs on utility poles. These items can be safety hazards to vehicles and pedestrians as well as interfere with the proper operation of electric service.
- ✓ **Campaign Activities on Election Day**  
On Election Day, at the polling place, political signs must be held by a person. No signs may be put into the ground, hung on fences or put on publicly owned property. No signs may be left unattended outside of the polling location.  
  
**No Electioneering/Campaigning**, or any action intended to influence the action of a voter, **is allowed within 150 feet of the entrance door to the polling location**. Prohibited actions include holding any campaign signs; circulating or distributing campaign materials; wearing any campaign buttons or identifying signage; soliciting a person's vote for or against a candidate or question on the ballot; or distributing stickers. Extended time talking with Election workers or other residents in the polling location after you have voted may appear to be campaigning. Vehicles displaying campaign materials are also prohibited within the 150 feet of entrance. *950 CMR 52.03(22)(c)*



# TOWN OF FREETOWN

## KEY DATES TO REMEMBER FOR 2023 ANNUAL TOWN ELECTION

### NOMINATION PAPERS:

<b>Thursday, February 9, 2023</b> at 5:00 PM.	Last Day and Hour to <b><u>obtain</u></b> Nomination Papers from Town Clerk's office	<i>MGL Ch.53 §9A</i>
<b>Monday, February 13, 2023</b> at 5:00 PM.	Last Day and Hour to <b><u>submit</u></b> Nomination Papers to Board of Registrars (at the Office of the Town Clerk) for certification	<i>MGL Ch.53 §7</i>
<b>Monday, February 27, 2023</b> at 5:00 PM.	Last Day for <b><u>Registrars</u></b> to file certified nomination paper with the Town Clerk	<i>MGL Ch.53 §10</i>
<b>Wednesday, March 1, 2023</b> at 5:00 PM.	Last day and Hour to <b><u>object to or withdraw</u></b> Nomination Papers from the Town Clerk's office	<i>MGL Ch.53 §11</i>
<b>Monday, April 3, 2023</b> 12Noon to 8:00 PM.	<b>ANNUAL TOWN ELECTION</b> at Freetown Elementary School, 43 Bullock Rd. Poll Locations: Precinct 1, Precinct 2 & Precinct 3	<i>FBL Art. 1.2</i>

### SIGNATURES (for **all positions w/exception** of the Regional School District Committee):

a minimum \*\* **40** \*\*certified signatures with addresses of registered voters who live in Freetown are required. Obtaining additional signatures are recommended in case some of the signatures cannot be certified.

**VOTER REGISTRATION:** In-person: Town Clerk's Office from Monday-Thursday 8:00 AM to 4:00 PM, and on Fridays 8:00 AM to 12:00 PM. Online: [www.voteinma.com](http://www.voteinma.com)

**FINAL REGISTRATION:** Town Clerk's office on **Friday, March 24, 2023**, from 8:00AM to 5:00PM. *MGL Ch.51 §26,28*

**POSTING OF THE ELECTION WARRANT:** Deadline **Monday, March 27, 2023**. *MGL Ch. 39 §10*

**ABSENTEE BALLOTS:** Applications must be submitted to the Town Clerk's Office *prior* to receiving a ballot. You may submit your ballot either in-person or via mail.

*The deadline to apply & method is as follows:*

**Mail-in Absentee/Vote by Mail:** **by 5:00 pm Monday, March 27, 2023**  
**In-person Absentee at Town Hall** **by 5:00 pm Friday, March 31, 2023**

**CAMPAIGNING:** NO campaign literature, buttons, signs or other materials may be displayed within **150 feet** of the building entrance to a polling location. Any candidate, member of a ballot question committee, and/or their workers, are prohibited from remaining within 150 feet of a polling location for the purpose of greeting and/or promoting any candidacy or cause to be voted on at that election

**POLITICAL SIGNS POLICY-** See attached notice.

### CAMPAIGN FINANCE REPORT FILING DEADLINES:

- ✓ Form CPF M102 **Due:** **Monday, March 27, 2023**  
(Eight (8) days preceding election)
- ✓ Form CPF M102 **Due:** **Wednesday, May 3, 2023**  
(Thirty (30) days after election)
- ✓ End of Year Report **Due:** **Friday, January 20, 2024**

If you do not receive any contributions, spend any money (including your own) or incur any liabilities in connection with your campaign, you may sign **FORM CPF M102-0** (available at the Town Clerks Office) for each reporting period in lieu of filing Form CPF M102.

**All candidates must comply or be subject to notification to the Attorney General's Office.**

**\*\*PLEASE BE ADVISED, ONCE A CANDIDATE IS ELECTED OR RE-ELECTED TO OFFICE THEY MUST BE SWORN IN PRIOR TO THEIR NEXT MEETING\*\***



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Poll Locations: Precinct 1, Precinct 2 & Precinct 3

*FBL Art. 1.2*

### SIGNATURES (for the **Regional School District Committee only**):

a minimum **\*\* 50 \*\***certified signatures with addresses of registered voters who live in Freetown are required. Obtaining additional signatures are recommended in case some of the signatures cannot be certified.

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**MASSACHUSETTS**  
*Office of the Town Clerk*

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Cheryl C.A. Estrella, CMC  
Town Clerk

Timothy J. McIntosh  
Assistant Town Clerk

## 2022 Annual Town Election

Nomination Papers For The Following Town Offices  
Are Available Beginning Tuesday, January 3<sup>rd</sup> at 9am

Elected Body	Term	# Positions Available	Currently Held By
Board of Selectmen & Personnel Board	3 Years	1	Trevor R. Matthews
Board of Health	3 Years	1	---
Board of Health	2 Years	1	---
Board of Health	1 Year	1	---
Board of Assessors	3 Years	1	Jeffrey D. Field
Cemetery Commission	3 Years	1	Michael T. McCue
Finance Committee	3 Years	2	Robert H. Alderson Gary A. Martin
Housing Authority	5 Years	1	Brian W. Miller
Housing Authority	4 Years Unexpired	1	<i>Currently Vacant</i>
Library Trustees	3 Years	2	Christine R. Paiva Paul G. Sadeck
Planning Board	5 Years	1	Robert P. Jose
Water & Sewer Commission	3 Years	1	Keven V. Desmarais
Regional School District Committee (Freetown)	3 Years	1	Jennifer A. Blum Robert W. Clark

Positions / Information as of: **December 1, 2022**



**TOWN OF FREETOWN**  
**MASSACHUSETTS**  
*Office of the Town Clerk*

3 North Main Street  
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Phone: 508-644-2201; Ext. 2  
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Cheryl C.A. Estrella, CMC  
Town Clerk

Timmothy J. McIntosh  
Assistant Town Clerk

**Statement of Candidacy for Municipal Office**

*Pursuant to the provisions of Massachusetts General Laws Chapter 53, § 9A, I hereby declare that I am requesting nomination papers to become a candidate in the **2023 Annual Town Election** for the office(s) designated below:*

Name: \_\_\_\_\_

Residential Address: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Phone: \_\_\_\_\_

I give permission to release my email address to news media: YES NO

I give permission to release my phone number to news media: YES NO

Office(s) Sought	Term	# of Nomination Papers Issued
<input type="checkbox"/> Board of Selectmen & Personnel Board	3 Years	
<input type="checkbox"/> Board of Health	3 Years	
<input type="checkbox"/> Board of Health	2 Years	
<input type="checkbox"/> Board of Health	1 Year	
<input type="checkbox"/> Board of Assessors	3 Years	
<input type="checkbox"/> Cemetery Commission	3 Years	
<input type="checkbox"/> Finance Committee	3 Years	
<input type="checkbox"/> Housing Authority	5 Years	
<input type="checkbox"/> Housing Authority	4 Years Unexpired	
<input type="checkbox"/> Library Trustees	3 Years	
<input type="checkbox"/> Planning Board	5 Years	
<input type="checkbox"/> Water & Sewer Commission	3 Years	
<input type="checkbox"/> Regional School District Committee (Freetown)	3 Years	

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

The seal of the Town of Freetown, Massachusetts, is a circular emblem. It features a central shield with a cross and a Native American figure holding a bow and arrow. The shield is surrounded by a wreath. The outer ring of the seal contains the text "TOWN OF FREETOWN, MASS." at the top and "INCORPORATED 1683" at the bottom, separated by two stars.

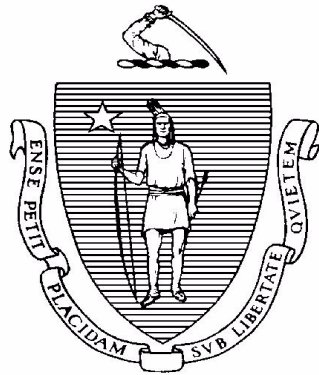
# **Campaign Finance Supplement**

Cheryl C.A. Estrella, CMC  
Town Clerk



# CAMPAIGN FINANCE GUIDE

*Candidates for Municipal Office  
Who File Locally  
(Non-Depository)*



Office of Campaign and Political Finance  
Commonwealth of Massachusetts



mguidemain



❗ Can't find what you're looking for? Email us at [ocpf@mass.gov](mailto:ocpf@mass.gov) (<mailto:ocpf@mass.gov>)

📘 General Information [1] ()    💰 Contributions ()

#### Top Result

### **Campaign finance guide for municipal candidates who file with their local election officials**

Chapter 55, Section 27, requires OCPF to provide a summary of the campaign finance law to candidates and political committees. The following is a summary of the campaign finance law for municipal candidates.

#### **The Steps: In Brief**

1. Organize with the local election official, usually the city or town clerk, by filing the M101 form ([https://ocpf2.blob.core.windows.net/pdf/forms/cpf\\_m101\\_18.pdf](https://ocpf2.blob.core.windows.net/pdf/forms/cpf_m101_18.pdf)). Even candidates without a committee file the M101.
2. Open a standard checking account to deposit contributions. Most banks require an EIN from the IRS (<https://ocpf.us/PublicSearch/Index?q=EIN#undefined>) to open an account.
3. In towns, file the M102 campaign finance form ([https://ocpf2.blob.core.windows.net/pdf/forms/M102\\_edit.pdf](https://ocpf2.blob.core.windows.net/pdf/forms/M102_edit.pdf)) eight days before the election and 30 days afterward. The reporting period dates can be calculated here (<https://www.ocpf.us/Home/MuniClerkSupport#tabCalculator>).
4. In cities, local filers file the M102 campaign finance form eight days before the preliminary election, if the filers appear on the preliminary ballot, and eight days before the general election.
5. Year-end reports are filed each Jan. 20 by municipal candidates.

## **Guide for municipal candidates who file locally**

This guide is designed to introduce non-depository candidates for elected municipal office and the treasurers of their political committees to the state's campaign finance law. Non-depository municipal candidates include all candidates for city or town office who file campaign finance reports locally, with their local election officials, such as selectboard and school committee.

All mayoral candidates, as well as city council candidates in cities with populations of more than 65,000, file electronically with OCPF in the depository bank system. Such candidates should consult the guide for depository candidates and committees.

### **The Municipal Candidate**

If you are thinking about running for elective office, you should contact your local election official (city or town clerk or election commission) or OCPF before undertaking any activity. The statute has a very broad definition of "candidate." The law may consider you a candidate well before any formal announcement of candidacy is made.

This guide is designed to address issues concerning candidates for elected municipal office who file locally, not for members of a representative town meeting, who are exempted from the reporting and disclosure provisions of the campaign finance law. Activities of the treasurer of a political committee organized on behalf of a municipal candidate are also covered in this guide.

This guide applies to all municipal candidates in the non-depository system who file locally, such as candidates for school committee, selectboard, and city council in cities with populations of 65,000 or less. This brochure does not apply to candidates seeking the office of mayor, as well as city council in the cities of Boston, Brockton, Cambridge, Fall River, Framingham, Haverhill, Lawrence, Lowell, Lynn, Malden, New Bedford, Newton, Quincy, Somerville, Springfield, Waltham and Worcester, who are required to designate a depository bank and file periodic bank reports with OCPF. All mayoral candidates, and city council candidates from those cities, should consult OCPF's guide for depository candidates.

### **Organization and Disclosure Forms**

The following is a summary of the appropriate forms required for municipal candidates. Unless otherwise noted, all forms are available from, and are to be filed with, the local election official in your community.

#### **Form CPF M 101: Statement of Organization**

Although the law does not require a candidate to have a political committee organized on his or her behalf, most candidates have one. A public employee who runs for elective office and wishes to raise funds must have a committee organized on his or her behalf to handle all fundraising since public employees are prohibited by law from political fundraising, even for their own campaigns. A political committee may not accept any contributions, make any expenditures or incur any liabilities until the treasurer qualifies for the office of treasurer by completing, signing and filing Form CPF M101.

Candidates without a committee must also file the M 101 form, with the "candidate only" box checked. The committee portions of the form are not completed by a "candidate only."

The M 101 contains the names and addresses of the committee chairman and treasurer and the name of the candidate for whom the committee is organized. Any change in information submitted should be reported to the local election official within 10 days of such change.

Political committees are prohibited from receiving or expending funds without an appointed treasurer.

Any change in treasurer should therefore be submitted by completing Form CPF M T 101 ([https://ocpf2.blob.core.windows.net/pdf/forms/cpft101\\_2018.pdf](https://ocpf2.blob.core.windows.net/pdf/forms/cpft101_2018.pdf)) and filing it immediately with the local election official.

A candidate may have only one committee organized on his or her behalf, even if the candidate holds more than one elective office. If a municipal candidate who files locally plans to seek state or county office, or vice versa, such candidate must transfer his or her committee from the state to the municipality or vice versa. OCPF can assist you in accomplishing these transfers.

By law, a committee must name a chairman and a treasurer. The chairman and the treasurer may be the same person, unless that person is a public employee. A public employee may not serve as the treasurer of any political committee. A candidate may not be the treasurer of his or her own committee, but may be the chairman.

Form CPF M 102: ([https://ocpf2.blob.core.windows.net/pdf/forms/M102\\_edit.pdf](https://ocpf2.blob.core.windows.net/pdf/forms/M102_edit.pdf)) Campaign Finance Report Municipal Form

Every city or town candidate who files locally is required to file Form CPF M102 with the local election official on or before each reporting date as discussed in this guide. This report must be signed by the candidate and treasurer, if any, under the penalties of perjury.

Candidates and treasurers are responsible for the legality, validity, completeness and accuracy of each of their reports. The following information should be filed on Form CPF M102:

**Schedule A - Receipts:** An alphabetical listing of all contributions in excess of \$50 received in a reporting period, including the date the contribution was received and the residential address of the contributor. This information must also be reported for receipts of \$50 or less if the total contributions from the individual have exceeded \$50 in the calendar year. Otherwise, receipts of \$50 and under may be added together on one line and included in total receipts. However, complete information, including date, name, residential address and amount, must be kept by the candidate or committee regardless of the amount of the contribution. If the contribution is \$200 or more, the occupation and employer of the contributor must also be disclosed.

**Schedule B - Expenditures:** An alphabetical listing of all disbursements in excess of \$50 with the amount and date of payment, the name and address of the payee and the purpose of the expenditure. Those expenditures of \$50 or less may be added together on one line and included in the total expenditures. However, complete information concerning all expenditures, including date, payee, address, amount and purpose, must be kept by the candidate or committee regardless of the amount.

**Schedule C - In-Kind Contributions:** An alphabetical listing of all in-kind contributions of anything of value other than money with a value in excess of \$50 in a calendar year. This listing includes the date, the name and residential address of each contributor and a description of the contribution. The occupation and employer of any contributor of \$200 or more in in-kind goods or services, or a combination of money and in-kind contributions, is also required. For those contributions valued at \$50 and under, a one-line total is included in the aggregate of all in-kind contributions for the period. In-kind contributions do not include volunteers' personal services or the exercise of ordinary hospitality.

**Schedule D - Liabilities:** An alphabetical listing of all outstanding, unpaid obligations as of the last day of the reporting period, regardless of when the liability was incurred. Included is the amount, the date the liability was incurred, the name and address to whom it is due and the purpose of the liability. Liabilities are carried over from each report to the successive report until such time as they are satisfied.

#### **HIGHLY RECOMMENDED: OCPF SOFTWARE FOR FILING REPORTS**

Municipal candidates who file locally may use OCPF's Reporter software to complete, print and then sign their M102 campaign finance reports. Click here (<https://ocpfreporter.us/LocalFilerSignup>) to register. Do this instead of completing the M102 campaign finance form by hand.

Totals from all of the above categories are summarized in a schedule on the front page of Form CPF M102 (done automatically using Reporter software). Detailed instructions (<https://ocpf2.blob.core.windows.net/pdf/guides/m102illustratedguide.pdf>) for completing Form CPF M102.

Form CPF M102-0: ([https://ocpf2.blob.core.windows.net/pdf/forms/cpf\\_m1020.pdf](https://ocpf2.blob.core.windows.net/pdf/forms/cpf_m1020.pdf)) Campaign Finance Report (Affidavit) Municipal Form

The M102-0 statement may be filed in lieu of the Form CPF M102 only by candidates who file locally and do not have a political committee organized on their behalf, and have not received any contributions, spent any money or incurred any debts. A candidate without a committee and without any campaign finance activity may instead file a Form CPF M102 with zeros for summary totals, but either Form CPF M102 or Form CPF M102-0 must be filed by every candidate on the ballot.

Form CPF M109: (<https://ocpf2.blob.core.windows.net/pdf/forms/CPFM109.pdf>) Campaign finance report for candidates with no activity

Similar to the M102-0, this statement is filed by a candidate who files locally and does not have a political committee organized on their behalf, and have not received any contributions, spent any money or incurred any debts. This form is only filed once a year, covering the entire year, in lieu of filing prepreliminary, preelection and post-election reports.

### **Filing Deadlines**

Candidates are required by statute to file periodic campaign finance reports and are also responsible for the legality, validity, completeness and accuracy of their reports. The following is a schedule for filing reports. These reports must be filed whether or not money has been raised or expended during the reporting period and whether or not the candidate is nominated or elected.

Reports are due to the local election official by the close of business on the day the report is due. The candidate is personally liable for a \$25 per day late fine assessed by OCPF for each day a report is late.

In general, candidates in town elections file two campaign finance reports for an election, while city candidates file three reports. The following is the schedule for filing municipal reports:

Preliminary Report (Cities and some Towns): Due on or before the 8th day preceding the city or town preliminary election, complete from the day following the ending date of the last report filed through 10 days before the due date. If this is an initial report, the activity period is from the day following the date of the last election for the office sought through 10 days before the due date. A candidate will file a prepreliminary report only if his or her name appears on a preliminary ballot.

Pre-Election Report (Cities and Towns): Due on or before the 8th day preceding the city or town general election, complete from the day following the ending date of the last report filed through 10 days before the due date.

Post-Election Report (Spring elections): Due on or before the 30th day following the general election complete from the day following the ending date of the last report filed through 10 days before the due date. This report may be considered a final report if the candidate/committee has no cash balance, assets or outstanding liabilities, and did not win. Most spring elections occur in towns.

Year-End Report (Cities and Towns): Due on or before January 20 in the year following, complete from the day following the ending date of the last report filed through December 31. This year-end report must be filed every year so long as a committee is in existence, or a candidate maintains a campaign fund, has outstanding debts, or is an incumbent elected official.

Special Elections (Cities and Towns): In general, candidates and treasurers in special municipal elections file reports eight days before a preliminary election (if any), eight days before a final election and 30 days after the final election. The post-election report may also be considered a final report if the candidate/ committee has no cash balance, assets or outstanding liabilities. Candidates and committee treasurers should contact their local election official for specific dates in the event of a special election.

**Sub-vendor reports:** ([https://ocpf2.blob.core.windows.net/pdf/forms/m\\_sv1.pdf?t=MteEIKS](https://ocpf2.blob.core.windows.net/pdf/forms/m_sv1.pdf?t=MteEIKS)) A political committee that makes a payment to or incurs a liability to a vendor must disclose the full name and address of each sub-vendor receiving payments of more than \$500 in total during a calendar year from the original vendor. A vendor is any person, including a consultant, who provides goods or services to a political committee and either receives or is promised \$5,000 or more during a calendar year by the committee for goods or services. Vendors are required to report sub-vendor payments to the candidate's committee, who is then required to disclose the expenditure information on reports with the local election official.

Posting Reports: All campaign finance reports required to be filed with the city or town must be made available for viewing on the municipal Web site within 30 days after the filing deadline if the report discloses that a candidate or committee has received contributions or made expenditures in excess of \$1,000 during a reporting period or incurred liabilities or acquired or disposed of assets in excess of \$1,000 during a reporting period. The reports are posted by local election officials.

NOTE: A candidate who appears on a municipal ballot must file campaign finance reports, even if he or she only used his or her personal funds and did not raise money from other sources.

## **Receipts**

All campaign funds received must be placed in a separate fund apart from any and all other funds.

The following is a summary of limitations placed on contributions made to a candidate or candidate's committee:

- An individual may contribute up to an aggregate of \$1,000 (monetary or in-kind contributions, or a combination of both) to a candidate and that candidate's committee in a calendar year.
- A political action committee (PAC) or a people's committee may contribute up to an aggregate of \$500 per year to a candidate and that candidate's committee.
- Registered lobbyists may only contribute up to an aggregate of \$200 per year to a candidate and that candidate's committee.
- A ward, town or city political party committee may contribute up to an aggregate of \$1,000 per year to a candidate and that candidate's committee. There is no limit on in-kind contributions from a local party committee.
- A candidate or candidate's committee may not accept any contribution, including an in-kind contribution of goods, services, equipment, personnel, facilities or the like, from business or professional corporations, partnerships or limited liability companies, or from any association or organization comprised in whole or in part of business or professional corporations. However, an individual may use his or her sole proprietorship to make a contribution to the campaign fund of a candidate, as long as the name of the individual contributor is also disclosed.

The reporting of all contributions received by a candidate or a candidate's committee is required under M.G.L. Chapter 55. Some of the requirements for such disclosure are outlined below.

- Each contributor must furnish the candidate or committee with his/her true name and address at the time the contribution is made.
- A candidate or committee must disclose the name and address of each contributor of more than \$50 in a calendar year. If an individual gives \$200 or more in a calendar year, the committee must also ask once at the time of solicitation and, if necessary, in one written follow-up request for the contributor's occupation and employer. A copy of the written request must be kept as part of the committee's records. If a contributor still

does not provide the information after the two requests, the committee has complied with the law and may keep the contribution. The committee should also disclose on the campaign finance report that it has complied with the law by noting "letter sent" in the occupation and employer field.

- Contributions received and disclosed from a union, association, trust or foundation must include the names and residential addresses of its principal officer(s).
- Contributions from the same person that in the aggregate in a calendar year exceed \$50 must be made by a personal check or a check drawn on an account for which the contributor is personally liable. Contributions by cash, wire transfer, payroll deduction etc. are prohibited in amounts greater than \$50 in the aggregate per contributor per calendar year. For contributions made by money order, the limit is \$100. For contributions made by credit card, candidates and committees should contact OCPF for its regulations concerning the process.
- Contributions by peer-to-peer cash apps, such as Venmo and Zelle, are limited to \$50 per year per individual. Names and addresses of each donor are required.
- Contributions of anything of value other than cash or checks are "in-kind" contributions. In-kind contributions are reportable on the "in-kind" schedule (Schedule C) and are subject to the same contribution limits previously mentioned. Examples of in-kind contributions include, but are not limited to, rental space for headquarters, furniture, office equipment, printing, postage and advertisements.
- Loans are defined as contributions and are subject to the same contribution limits previously mentioned. Municipal candidates may make loans to their own committees without limit.

#### **Joint Checking Account Contributions**

Any joint contribution received by a candidate or committee that does not indicate the amount to be attributed to each contributor may be attributed equally to each contributor, provided that the contribution does not cause a donor to make an excess contribution. For example, if a committee receives a \$1,500 check on a joint check, and both names are printed on the check, the committee can attribute \$750 to each person.

#### **Expenditures**

The following is a summary of limitations placed on expenditures by candidates and candidate committees:

- Expenditures by a candidate or a candidate committee may be made for the enhancement of the political future of the candidate so long as such expenditure is not primarily for the candidate's or any person's personal use.
- A candidate for city or town office may make expenditures from his or her personal funds without limitation for the purposes of his or her own campaign, including making contributions to his or her committee. All such expenditures and contributions must be fully disclosed on Form CPF M102.
- If a candidate makes expenditures only from his or her own personal funds without raising any money, the candidate must report all funds that he or she expended as a contribution to the campaign on Schedule A (receipts) and as an expenditure by the campaign on Schedule B (expenditures).
- A business or professional corporation, partnership, limited liability partnership or limited liability company may not provide goods, services, equipment, personnel or facilities, unless it is paid fair market value for such items by the candidate or committee. Sole proprietorships, however, may make in-kind contributions, as long as the contributions are attributed to an individual making them and do not exceed statutory limits.
- Any expenditure for an amount exceeding \$50 must be made by check, debit card or credit card.

- The committee of a candidate for local elected office may not give in the aggregate in a calendar year more than \$100 to another candidate or candidate committee.
- Surplus money may be placed in an interest bearing savings account or money market account. No other type of investment is permitted by law.
- No person authorized to make an expenditure from a political committee may sign a committee check payable to himself or herself. The restriction applies to any candidate who has a committee organized on his or her behalf. For example, if a candidate for city council uses his personal credit card to buy paper supplies for the campaign and wants to be reimbursed, he is prohibited from writing a committee check to himself for the reimbursement. Another individual authorized to write checks on the committee account would sign the reimbursement check.

### **Dissolution of a Committee**

Committees that have no cash balance, assets or outstanding liabilities and wish to dissolve may do so.

Candidates and committees that do not dissolve must continue to report on a regular basis. All residual funds from committee or candidate accounts must be donated to one or more of the following: (1) the Commonwealth of Massachusetts General Fund; (2) the general fund of a city or town; (3) a scholarship fund; or (4) a charitable or religious organization. Donations to scholarship funds and charities are subject to certain restrictions. Contact OCPF for more information.

Treasurers of committees are required by law to preserve detailed accounts, vouchers and receipts for six years from the date of the relevant election. This statutory provision applies to all political committees organized in Massachusetts.

### **Public Employees, Buildings and Resources**

OCPF administers Sections 13-17 of M.G.L. Chapter 55, which concern political activity involving public employees, buildings and other resources that are publicly funded. These laws were designed to: protect public employees from being coerced into providing political contributions or services as a condition of their employment; protect individuals doing business with the public sector from being coerced into providing political contributions or services; and separate governmental activity from political campaign activity.

The following is a summary of the limitations on the political finance activities of public employees and the use of public buildings and resources in campaigns:

- No state, county, city or town employee employed for compensation, other than an elected official, may directly or indirectly solicit or receive any contribution or anything of value for any political purpose. o Public employees may not be treasurers of political committees.
- If a person is both a public employee and an elected official, the prohibitions against soliciting or receiving political contributions would still apply to him or her.
- No person may solicit or receive campaign contributions in a building occupied for any state, county or municipal purpose. o No person in the public service may be compelled to make a political contribution or to render any political service, and no public official or employee may be prejudiced in his or her employment for failure to make a political contribution or be rewarded for making a political contribution.
- A political committee may not solicit or receive a contribution on behalf of a candidate who is public employee if the contributor has an interest in any particular matter in which the employee participates or which is the subject of his or her official responsibility.
- No public resource may be expended or utilized in order to promote or oppose the nomination or election of any candidate to public office or to promote or oppose any ballot question placed before the voters. Examples of public resources include: paid staff time of public employees, office equipment, vehicles, buildings and supplies.



In some cases, agency policy or the conflict-of-interest law, M.G.L. Chapter 268A, may establish additional standards for political activity by public employees. Public employees should consult the State Ethics Commission as well as their supervisors or agency heads.

### **Seeking Guidance from OCPF**

OCPF welcomes inquiries regarding campaign finance activities. The office issues written advice, including advisory opinions and guidance letters, to individuals based on written requests describing specific facts and circumstances. OCPF can issue opinions only on prospective activities. If you have any questions concerning advisory opinions, please contact the office. You may also obtain informal, oral advice by calling the office at 617-979-8300. In addition to issuing specific written advice, OCPF occasionally issues interpretive bulletins and memoranda setting guidelines on a variety of subjects. These documents are available from OCPF and may be helpful in helping candidates, committees and other organizations comply with the campaign finance law.

### **Filing a Complaint**

Individuals with information concerning possible violations of the campaign finance laws may call or write OCPF. If you have reason to believe that a violation has occurred, you may file a complaint (<https://ocpf.us/Legal/Index#undefined>). The office reviews all matters brought to its attention, regardless of the source of the complaint. The identity of complainants is kept confidential. OCPF cannot comment on any matter that is under review or investigation. Consequently, an individual making a complaint will not receive periodic information on the status of the complaint. The complainant will receive notice, however, of any public disposition of a case.

### **Frequently Asked Questions**

Q. Am I required to organize a committee for my campaign for municipal office?

A. Most candidates organize committees, but the campaign finance law does not always require it. If a candidate is a public employee and plans to raise money from other individuals for his or her campaign, they must form a committee because public employees may not solicit or receive campaign contributions. OCPF recommends that candidates form committees to receive and disburse funds and handle recordkeeping.

Q: May a candidate be the treasurer or chairman of his or her own political committee?

A: A candidate may not be treasurer of his or her own committee, but may serve as its chair.

Q: May the treasurer and chairman of the committee be the same person?

A: Yes, unless that person is a public employee. A public employee may not be treasurer of any political committee.

Q: May a business make a contribution to a candidate?

A: A business or professional corporation, partnership or limited liability company may not make contributions to candidates or their political committees. However, an individual may use his or her sole proprietorship to make a contribution to the campaign fund of a candidate. In such cases, the contribution from the business should be reported as coming from the individual owner who is D/B/A (doing business as) the unincorporated business.

Q: What number should I give the bank for the committee tax identification number?

A: Political committees should consult the Internal Revenue Service for information on how to obtain a federal tax identification number. In addition, you should contact the Massachusetts Department of Revenue for information on any state tax requirements that may be applicable.

Q: How much may I contribute to my own campaign?

A: While individual contributions are limited to \$1,000 in a calendar year, a candidate may contribute without limit from his/her personal funds to his/her own campaign. If your contribution is in the form of a loan to your committee, it must be reported not only as a contribution on Schedule A (receipts), but also as a liability on Schedule D (liabilities). Only if loans are properly reported may a candidate be repaid from campaign funds for contributions he or she has made.

Q: When are my campaign finance reports due, and how do I figure out the beginning and ending dates of the reporting period?

A: The reporting period is the period for which the candidate and his/her committee must report all campaign finance activity. This includes all activity from the day following the date of the last report filed through 10 days before the due date. For example: A local election is held on Tuesday, May 23. The pre-election report is due to the local election official on or before Monday, May 15 (eight days before the election). This report covers the period from the day after the ending date of the last report filed through 10 days before its due date. Therefore, if the candidate or committee's last report filed was a year-end report in January, complete through Dec. 31, the pre-election period will begin on Jan. 1 and end 10 days before the report is due, i.e. Friday, May 5. For first-time filers, the beginning date of this initial report is the day following the date of the last election for the office the candidate is seeking. The ending date is the same described above, 10 days before the due date.

Q: How can I change information on my Form CPF M101 (Statement of Organization)

A: Any changes to Form CPF M101 must be reported to the local election official within 10 days of the actual change. For most changes, a letter of amendment clearly stating the change to Form CPF M101 may be filed. The only exception is a change of treasurer, for which the candidate and the new treasurer must file Form CPF MT101 (Change of Treasurer). No money may be raised or spent by the committee until the new treasurer is appointed and Form MT101 is filed.

Q: I am an appointed public employee. May I ask a friend or relative to purchase a ticket to a fundraiser for a candidate?

A: No. Section 13 prohibits this activity at any time.

Q: I am an appointed public employee. May I run for public office?

A: Yes. While M.G.L. Chapter 55 does not prevent a public employee from running for office, it does prohibit fundraising by a public employee for any candidate. If you run for office, you must organize a political committee and have that committee handle all fundraising activity. You should also check with your agency, the State Ethics Commission and/or your city or town for further guidance.

Q: May a candidate or his or her committee use the city or town hall as an address to send a contribution to a candidate's political committee?

A: No. Such action is prohibited by Section 14.

Q: I am a public school teacher as well as a candidate for municipal office. May I use the school printing machine to prepare a flyer or letter about my candidacy, or may I distribute information about my candidacy to students in my classroom?

A: No. The campaign finance law prohibits any person from using a public resource such as office space or equipment for political purposes. The law also prohibits an appointed public employee from engaging in campaign activities while being paid by a municipality or other public agency during work hours.

Q: I am an elected official in my town. May I serve as an officer of a PAC on the state or local level?

A: No. Candidates and elected officials on the state, county and municipal levels are prohibited from serving as the principal officers of, or organizing, maintaining, financing or controlling PACs.

Q: I lost the election or have recently left elected office. What are my future reporting obligations?

A. If you do not plan to seek office again, you should dissolve your committee after eliminating any unpaid liabilities and remaining funds. Funds must be disposed of through the Residual Funds clause. Candidates are not required to shut down after losing or leaving office. If a candidate continues to operate a committee for future political activity, however, the candidate and committee must continue to file disclosure reports with the local election official at least once a year. If a candidate again seeks election, he or she would report on the filing schedule for that office.

Office of Campaign and Political Finance

One Ashburton Place, Room 411 Boston, MA 02108

(617) 979-8300

E-mail: [ocpf@mass.gov](mailto:ocpf@mass.gov)

Web site: [www.ocpf.us](http://www.ocpf.us)

Twitter: [@OCPFReports](https://twitter.com/OCPFReports) (<https://twitter.com/OCPFReports>)

10/2022

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**TOWN OF FREETOWN**  
**MASSACHUSETTS**  
*Office of the Town Clerk*

3 North Main Street  
P.O. Box 438  
Assonet, MA 02702  
Phone: 508-644-2201; Ext. 2  
Fax: 508-644-9826  
[www.freetownma.gov](http://www.freetownma.gov)  
[townclerk@freetownma.gov](mailto:townclerk@freetownma.gov)

Cheryl C.A. Estrella, CMC  
Town Clerk

Timmothy J. McIntosh  
Assistant Town Clerk

January 3, 2023

Dear Candidate,

Your first Campaign Finance Report will be due in this office on **March 27, 2023** (normally the 8<sup>th</sup> day preceding the election but moved to the next business day as the 8<sup>th</sup> day is a weekend) and a second report will be due on **May 3, 2023** (the 30<sup>th</sup> day following the election).

If you have *any expenses or accepted any contributions*, you will need to complete a CPF-M102 Form (due **March 27<sup>th</sup>** and **May 3<sup>rd</sup>**, as stated above). Even if you are paying for expenses yourself, you will still need to complete the CPF-M102 forms.

Enclosed is a CPF-M102 form and instructions for filing. Further information and forms can be obtained by visiting the Office of Campaign Finance (OCPF) website at [www.ocpf.us](http://www.ocpf.us) (use the search bar to find the form or information you are seeking, or choose the "Forms & Education" dropdown, select "Guides, Forms & Publications", and then the "Municipal Forms" tab). This information is also available at the Office of the Town Clerk if necessary. A tutorial for municipal candidates is available on the OCPF website, [www.ocpf.us/](http://www.ocpf.us/). This website is a wonderful resource for all things campaign related. Please be sure to access their short videos! These fillable forms can also be found on the elections section of the Town's website, [www.freetownma.gov/elections](http://www.freetownma.gov/elections).

If you are a candidate that will have no expenses, no contributions, etc., you are now able to sign only a CPF-M109 form, which is due on by **March 27, 2023**. A copy of the CPF-M109 form is enclosed. If your intentions change and you do have expenses, contributions, etc., you will be required to file the CPF-M102 forms as noted above.

Finally, also enclosed is a CPF-M101 Form – Statement of Organization. This form was previously required only for candidates that have committees, but a change in state regulations now requires it from ***all candidates before any fundraising or before any campaign activity begins***.

Please contact me at 508-644-2201, ext. 2, if you have any questions regarding the above forms or due dates. Reports can be submitted to this office by hand, mail, fax or by email – contact information can be found at the top of the page. You can also contact the Massachusetts Office of the Campaign and Political Finance directly at 617-979-8300 or [www.ocpf.us](http://www.ocpf.us).

**IMPORTANT:** The campaign finance law mandates that a civil penalty of \$25 per day up to \$5,000 be assessed personally against the candidate for any report that is filed after the due date and upon referral to the OCPF.

Good luck with your candidacy for office!

Sincerely,

Cheryl C.A. Estrella, CMC  
Town Clerk



# Form CPF M101: STATEMENT OF ORGANIZATION CANDIDATE OR CANDIDATE'S COMMITTEE MUNICIPAL FORM

## Office of Campaign and Political Finance

File with: City / Town Clerk or Election Commission

NOTICE IS HEREBY GIVEN in accordance with the provisions of General Laws, Chapter 55, as amended, organization of a candidate or candidate's committee as follows:

<b>CANDIDATE:</b>	Full Name: _____
	Residential Address: _____
	City / State / Zip: _____
	E-Mail Address: _____ Phone #: _____
	Party Affiliation: _____ (If applicable)
<b>OFFICE SOUGHT/PURPOSE:</b>	
	Title: _____ District: _____
	<input type="checkbox"/> Candidate without committee (check if applicable). If checked, do not complete committee or officer sections: sign as candidate, date and file with clerk or local election official.

<b>COMMITTEE:</b>	Name of Committee: _____
	(The name of the committee must include the candidate's last name)
	Committee Mailing Address: _____
	City / State / Zip: _____ Phone #: _____

### OFFICERS:

<b>Chairperson:</b> _____	<b>Treasurer*:</b> _____
Residential Address: _____	Residential Address: _____
City / State / Zip: _____	City / State / Zip: _____
Phone #: _____	Phone #: _____ Email: _____

\*A public employee may not serve as treasurer of any political committee (see reverse).

Additional officers may be listed on page two.

Check applicable box before signing:

☐ Candidate with committee: I hereby 1) consent to this filing; 2) understand that a candidate shall not consent to the organization of more than one account or committee on their behalf; 3) am subject to certain duties and liabilities under M.G.L. c. 55, including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election; and 4) may not serve as treasurer of a political committee organized on my behalf.

☐ Candidate without committee: I hereby 1) consent to this filing; 2) understand that a candidate shall not consent to the organization of more than one account or committee on their behalf; 3) acknowledge if I become a public employee I must organize a committee and may not serve as treasurer; and 4) am subject to certain duties and liabilities under M.G.L. c. 55 including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election.

SIGNED UNDER THE PENALTIES OF PERJURY: \_\_\_\_\_ Date: \_\_\_\_\_  
Candidate's signature

I hereby accept the office of Treasurer of the above-named committee. I affirm that I am not a public employee as defined by M.G.L. c. 55, s. 13. I understand that: 1) I am subject to certain duties and liabilities under M.G.L. c. 55, including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election; 2) if after my acceptance of this office I become an appointed public employee, I must resign this position and notify OCPF of my resignation; and 3) a candidate may not serve as treasurer of the political committee organized on their behalf.

SIGNED UNDER THE PENALTIES OF PERJURY: \_\_\_\_\_ Date: \_\_\_\_\_  
Treasurer's signature

I hereby accept the office of Chairperson of the above-named committee.

SIGNED UNDER THE PENALTIES OF PERJURY: \_\_\_\_\_ Date: \_\_\_\_\_  
Chairperson's signature

**ADDITIONAL OFFICERS:**

Other Officer/Title: _____	Other Officer/Title: _____
Residential Address: _____	Residential Address: _____
City / State / Zip: _____	City / State / Zip: _____
Phone #: _____	Phone #: _____

**DEFINITION OF A PUBLIC EMPLOYEE**

M.G.L. Chapter 55, Section 13 states that a person who is employed for compensation by the Commonwealth or any county, city or town (other than an elected official) may not directly or indirectly solicit or receive political contributions. Such persons may not serve as treasurers of any political committee. If you are unsure of your status, please contact OCPF for further guidance.

**SELECTED EXTRACTS FROM M.G.L C. 55****Section 1 defines a candidate's committee:**

*"Candidate's committee", the political committee organized on behalf of a candidate .... The term "candidate's committee" shall also apply to the campaign fund of a candidate who has not organized a political committee for the purpose of carrying out the election campaign of such candidate or who receives contributions or makes expenditures independently of said committee.*

**Section 2 requires candidates to keep certain records:**

*Every candidate shall keep detailed accounts of all contributions received by him, or by a person acting on his behalf and of all expenditures made by him, or by a person acting on his behalf. Said accounts may be kept by an agent duly authorized thereto, but the candidate shall be responsible for said accounts, which shall be kept separate and distinct from all other accounts and shall include contributions made by the candidate .... The candidate shall preserve all receipted bills and accounts relative to all contributions received, expenditures made and any other campaign finance activity. ...The candidate shall preserve said receipted bills and accounts for six years from the date of the relevant election....*

**Section 3 requires the director to:**

*"assess a civil penalty for any [late filed] report ... of twenty-five dollars (\$25) per day .... [up to \$5,000 per report]. In the case of failure to file by a candidate or a candidate's committee, the civil penalty shall be assessed against the candidate ....*

**Section 5 outlines statements of organization of political committees:**

*Each political committee shall organize by filing with the director or, if organized for the purpose of a city or town election only, with the city or town clerk, a statement of organization.*

*The statement of organization shall include: (1) the full name of the political committee, which, if organized on behalf of a candidate, shall include the name of the candidate in said name; .... (2) the address of the political committee; (3) a statement of the purpose for which the political committee is organized .... (4) the name and residential address of the chairman and the treasurer; (5) the name, residential address, and position of other principal officers, including officers and members of the finance committee, if any, and; (6) the name and address, if known, and party affiliation of each candidate the political committee is supporting; provided, however, that if a candidate is nominated without reference to a political party, the name of his political party shall not be required ....*

*Any change in information previously submitted in a statement of organization shall be reported to the director, or if organized for the purpose of a city or town election only, to the city or town clerk, within ten days following the change.*

*Each political committee shall have a treasurer who shall qualify for his office by filing a written acceptance thereof with the director, or if organized for the purpose of a city or town election only, with the city or town clerk. Said treasurer shall remain subject to all the duties and liabilities imposed by this chapter until his written resignation of the office is received or his successor's written acceptance is filed as aforesaid. No person acting under the authority of, or on behalf of, any political committee shall receive any money or anything of value, or expend or disburse the same, or incur expenses while it has no treasurer qualified as aforesaid ....*

*Each treasurer of a political committee shall keep and preserve detailed accounts, vouchers and receipts as prescribed for a candidate by the provisions of section two. Each treasurer of a political committee shall keep said records for a period of six years following the date of the relevant election ....*

*No expenditure shall be made for, or on behalf of, a political committee without the authorization of the chairman or treasurer, or their designated agents ....*

*All funds of a political committee shall be kept separate from any personal funds of officers, members or associates of such committee ....*

**IMPORTANT: M.G.L. c. 55, s. 5 requires that any changes in the information provided on this form shall be filed within ten (10) days of said change. Further information can be obtained from OCPF by phone at (617) 979-8300, via e-mail at [ocpf@mass.gov](mailto:ocpf@mass.gov) or on the web at [www.ocpf.us](http://www.ocpf.us)**



Commonwealth  
of Massachusetts

# Form CPF M 102: Campaign Finance Report Municipal Form

Office of Campaign and Political Finance

File with: City or Town Clerk or Election Commission

Fill in Reporting Period dates:

Beginning Date: \_\_\_\_\_

Ending Date: \_\_\_\_\_

Type of Report: (Check one)

☐ 8th day preceding preliminary    ☐ 8th day preceding election    ☐ 30 day after election    ☐ year-end report    ☐ dissolution

Candidate Full Name (if applicable)

Office Sought and District

Residential Address

E-mail: \_\_\_\_\_

Phone # (optional): \_\_\_\_\_

Committee Name

Name of Committee Treasurer

Committee Mailing Address

E-mail: \_\_\_\_\_

Phone # (optional): \_\_\_\_\_

## SUMMARY BALANCE INFORMATION:

**Line 1:** Ending Balance from previous report

**Line 2:** Total receipts this period (page 3, line 11)

**Line 3:** Subtotal (line 1 plus line 2)

**Line 4:** Total expenditures this period (page 5, line 14)

**Line 5:** Ending Balance (line 3 minus line 4)

**Line 6:** Total in-kind contributions this period (page 6)

**Line 7:** Total (all) outstanding liabilities (page 7)

**Line 8:** Name of bank(s) used:

### Affidavit of Committee Treasurer:

I certify that I have examined this report including attached schedules and it is, to the best of my knowledge and belief, a true and complete statement of all campaign finance activity, including all contributions, loans, receipts, expenditures, disbursements, in-kind contributions and liabilities for this reporting period and represents the campaign finance activity of all persons acting under the authority or on behalf of this committee in accordance with the requirements of M.G.L. c. 55.

Signed under the penalties of perjury: \_\_\_\_\_

(Treasurer's signature)

Date: \_\_\_\_\_

### FOR CANDIDATE FILINGS ONLY: Affidavit of Candidate: (check 1 box only)

#### Candidate with Committee and no activity independent of the committee

☐ I certify that I have examined this report including attached schedules and it is, to the best of my knowledge and belief, a true and complete statement of all campaign finance activity, of all persons acting under the authority or on behalf of this committee in accordance with the requirements of M.G.L. c. 55. I have not received any contributions, incurred any liabilities nor made any expenditures on my behalf during this reporting period.

#### Candidate without Committee OR Candidate with independent activity filing separate report

☐ I certify that I have examined this report including attached schedules and it is, to the best of my knowledge and belief, a true and complete statement of all campaign finance activity, including contributions, loans, receipts, expenditures, disbursements, in-kind contributions and liabilities for this reporting period and represents the campaign finance activity of all persons acting under the authority or on behalf of this committee in accordance with the requirements of M.G.L. c. 55.

Signed under the penalties of perjury: \_\_\_\_\_

(Candidate's signature)

Date: \_\_\_\_\_

## SCHEDULE A: RECEIPTS

*M.G.L. c. 55 requires that the name and residential address be reported, in alphabetical order, for all receipts over \$50 in a calendar year. Committees must keep detailed accounts and records of all receipts, but need only itemize those receipts over \$50. In addition, the occupation and employer must be reported for all persons who contribute \$200 or more in a calendar year.*

(A "Schedule A: Receipts" attachment is available to complete, print and attach to this report, if additional pages are required to report all receipts. Please include your committee name and a page number on each page.)

Date Received	Name and Residential Address (alphabetical listing required)	Amount	Occupation & Employer (for contributions of \$200 or more)
Line 9: Total Receipts over \$50 (or listed above)			
Line 10: Total Receipts \$50 and under* (not listed above)			
<b>Line 11: TOTAL RECEIPTS IN THE PERIOD</b>			

← Enter on page 1, line 2

\* If you have itemized receipts of \$50 and under, include them in line 9. Line 10 should include only those receipts not itemized above.



**SCHEDULE A: RECEIPTS (continued)**

Date Received	Name and Residential Address (alphabetical listing required)	Amount	Occupation & Employer (for contributions of \$200 or more)
Line 9: Total Receipts over \$50 (or listed above)			
Line 10: Total Receipts \$50 and under* (not listed above)			
<b>Line 11: TOTAL RECEIPTS IN THE PERIOD</b>			

← Enter on page 1, line 2

\* If you have itemized receipts of \$50 and under, include them in line 9. Line 10 should include only those receipts not itemized above.

## SCHEDULE B: EXPENDITURES

*M.G.L. c. 55 requires committees to list, in alphabetical order, all expenditures over \$50 in a reporting period. Committees must keep detailed accounts and records of all expenditures, but need only itemize those over \$50. Expenditures \$50 and under may be added together, from committee records, and reported on line 13.*

(A "Schedule B: Expenditures" attachment is available to complete, print and attach to this report, if additional pages are required to report all expenditures. Please include your committee name and a page number on each page.)

Date Paid	To Whom Paid (alphabetical listing)	Address	Purpose of Expenditure	Amount
Enter on page 1, line 4 →		Line 12: Total Expenditures over \$50 (or listed above)		
		Line 13: Total Expenditures \$50 and under* (not listed above)		
		<b>Line 14: TOTAL EXPENDITURES IN THE PERIOD</b>		

\* If you have itemized expenditures of \$50 and under, include them in line 12. Line 13 should include only those expenditures not itemized above.

**SCHEDULE B: EXPENDITURES (continued)**

Date Paid	To Whom Paid (alphabetical listing)	Address	Purpose of Expenditure	Amount
Enter on page 1, line 4 →		Line 12: Expenditures over \$50 (or listed above)		
		Line 13: Expenditures \$50 and under* (not listed above)		
		Line 14: TOTAL EXPENDITURES IN THE PERIOD		

\* If you have itemized expenditures of \$50 and under, include them in line 12. Line 13 should include only those expenditures not itemized above.

## SCHEDULE C: "IN-KIND" CONTRIBUTIONS

Please itemize contributors who have made in-kind contributions of more than \$50. In-kind contributions \$50 and under may be added together from the committee's records and included in line 6 on page 1.

[illegible]

\* If an in-kind contribution is received from a person who contributes more than \$50 in a calendar year, you must report the name and address of the contributor; in addition, if the contribution is \$200 or more, you must also report the contributor's occupation and employer.

## SCHEDULE D: LIABILITIES

*M.G.L. c. 55 requires committees to report ALL liabilities which have been reported previously and are still outstanding, as well as those liabilities incurred during this reporting period.*

Date Incurred	To Whom Due	Address	Purpose	Amount
Enter on page 1, line 7 →		Line 18: TOTAL OUTSTANDING LIABILITIES (ALL)		

## INSTRUCTIONS FOR COMPLETING CAMPAIGN FINANCE REPORTS FOR USE WITH FORM CPF M 102

### PAGE ONE:

#### (1) REPORT DATES

A campaign finance report must indicate the beginning date and ending date of the report period. Dates must be completed for the report to be accepted. Also, check off reason for filing report (i.e.. 8th day preceding election).

#### (2) CANDIDATE/COMMITTEE INFORMATION

Fill in the appropriate information in the candidate and/or the committee boxes.

#### (3) SUMMARY ACTIVITY (Lines 1-7)

- (a) Lines 1-5 of your campaign finance report are on a cash basis reporting system.
- (b) Lines 1-7 must be completed for a report to be accepted. They reflect ending balance from previous report, (line 1) total receipts for the reporting period, (line 2) and total expenditures for the reporting period (line 4) for the period as well as total money available as of the last day of the reporting period (line 5).
- (c) ENDING BALANCE, line 5, should be:
  - line 1 (beginning balance)
  - line 2 (total receipts this report)
  - line 3 (line 1 + line 2)
  - line 4 (total expenditures this report)
  - line 5 (line 3 - line 4) cash available
- (c) Line 5 can NOT be a negative figure since this is a cash reporting system (unless the campaign has an overdrawn checking account).
- (d) The candidate and/or treasurer should reconcile the most recent bank statement with the campaign finance report to ensure the accuracy of the reported balances.
- (e) Total in-kind contributions (line 6) are carried forward from Schedule C.
- (f) Total liabilities (line 7) are carried forward from Schedule D.
- (g) Total liabilities (line 7) must be cumulative, and reflect all debts of the committee outstanding as of the last day of the reporting period, not just debts incurred during the current period.

#### (4) SIGNATURES

- (a) Reports will not be accepted unless they contain original signatures of the treasurer (if a committee report) and the candidate in ink.
- (b) A candidate should always sign the box on the bottom of the form and check off the affidavit which is applicable to his/her situation. If the candidate has a committee and no expenditures were made independent of the committee by the candidate he/she should check off the top affidavit. If the candidate has made expenditures independent of the committee, the candidate must file a separate report disclosing the independent activity and check off the bottom affidavit on the report of the candidate's independent campaign activity.
- (c) For committee reports the treasurer must sign the affidavit for the committee treasurer in the box just above the box for the candidate.
- (d) If the candidate does not have a committee, he/she files a candidates report, checks off the bottom affidavit, and signs the report.

### PAGE TWO:

#### SCHEDULE A (RECEIPTS)

- (1) The report must itemize, alphabetically, the names and residential addresses of any receipt in excess of \$50 for the reporting period. These are totaled on line 9. Receipts of \$50 or less should be totaled from the committee's records, and disclosed in the aggregate on line 10. Lines 9 and 10 should be added, and the total shown on line 11. Total receipts (line 11) should be carried forward to page one, line 2.
- (2) If an individual's contribution is \$ 200 or more (or his contributions total \$ 200 or more in a calendar year), you must also report the contributor's employer and occupation. If you have sent the required letter requesting missing emp./occ. information and have not received a response at the time of filing indicate "letter sent" and the date of the letter.
- (3) A loan should be reported as a receipt under the name of the individual who is making the loan; you should indicate that it is a loan by writing "loan" in the space next to the amount.
- (4) Contributions from the candidate, including loans, must be reported as receipts.
- (5) Political Action Committee (PAC) contributions must be reported under the name of the PAC

(including CPF ID#) and not the name of the individual who signed or presented the check. PACs must be registered under M.G.L. c. 55 to contribute to Massachusetts candidates. (Registered PACs and their CPF ID numbers are available from OCPF.)

(6) Contributions from trusts, foundations, associations or other organizations must be disclosed under the organization's name along with the names and addresses of its principal officers.

(7) Contributions must be reported as of the date received, not the date they were deposited.

(8) Individual contributions made through non-incorporated businesses should be reported as an individual "doing business as," i.e. John Smith D/B/A Smith's Market. Committees should verify, prior to accepting such contributions, that such business is not incorporated.

(9) Schedule A must reflect all receipts of money during the reporting period including refunds from vendors or others and interest earnings.

#### **PAGE THREE:**

#### **SCHEDULE B (EXPENDITURES)**

(1) The report must itemize, alphabetically, all expenditures of more than \$50 for the reporting period. These are totaled on line 12. Expenditures of \$50 or less should be totaled from the committee's records, and disclosed in the aggregate line 13. Lines 12 and 13 should be aggregated, and the total shown on line 14. Total expenditures (line 14) should be carried forward to page one, line 4.

(2) For individuals who are reimbursed more than \$50 for expenditures made on behalf of the committee, an itemization of reimbursements, form R 1, must be completed to disclose the name, address, purpose and amount for each expenditure made on the committee's behalf.

(3) The stated purpose of each expenditure listed should convey detailed information about the political purpose of the expenditure.

(4) Schedule B must reflect all payments made by the committee including bank service charges and contributions to other committees, even if returned.

(5) If the committee holds a credit card, it must file form CPF M9 and copies of the credit card statements disclosing committee credit card activity. (NB. The credit card number is not required) If reimbursing an individual for charges made on a personal credit card, make payment to the individual and file form R 1 itemizing the reimbursement.

#### **PAGE FOUR:**

#### **SCHEDULE C (IN-KIND CONTRIBUTIONS)**

(1) The committee must report contributors who have contributed things of value (in-kind contributions) that exceed \$50 by indicating their name, address and a description of what was contributed. In-kind contributions of \$50 or less are aggregated on line 20. If the contribution is \$200 or more, the occupation and employer of the contributor is also required.

(2) Things of value that are NOT included as in-kind contributions are personal services, ordinary hospitality and incidental expenses in rendering a personal service.

#### **SCHEDULE D (LIABILITIES)**

(1) Schedule D is a cumulative schedule of ALL debts as of the last day of the reporting period. It includes:

- (a) Any unpaid bills that the committee has on hand.
- (b) All obligations for goods or services that have been provided to the committee that remain unpaid at the time of the report.
- (c) All outstanding loans from a candidate or others.

(2) Debts should be carried from one report to the next unless such debt has been paid or forgiven during the reporting period. If debt is forgiven, it should be listed as an in-kind contribution on Schedule C and a copy of the letter of forgiveness should be filed with the report.

#### **FORMAT FOR COMPUTER GENERATED REPORTS**

All computer generated report formats must be approved by the local election official prior to submission (other than OCPF's reporting software).

If you have any questions, or require further information, please call your election commission, city or town clerk, or the Office of Campaign and Political Finance.

9/99



Commonwealth  
of Massachusetts

**Form CPF M109:**  
**Statement of Municipal Candidate**  
**Not Raising or Expending Campaign Funds**  
**Office of Campaign and Political Finance**

File with: Local Election Official (City or Town Clerk)

Candidate's Name: \_\_\_\_\_

Office Sought: \_\_\_\_\_

Residential Address: \_\_\_\_\_

City / State / Zip: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

I hereby certify that I have not opened a campaign bank account for campaign funds because I do not intend to accept contributions or in-kind contributions, make expenditures, **including expenditures of my own funds**, or incur liabilities for any campaign-related purpose, **nor do I currently have any outstanding liabilities for prior campaign-related activity**. I submit the following as my campaign report for all bank reporting periods in this calendar year as provided for in Chapter 55 of the Massachusetts General Laws:

1. Ending balance from previous report	ZERO
2. Total receipts for reporting period	ZERO
3. Subtotal	ZERO
4. Total Expenditures for reporting period	ZERO
5. Ending balance	ZERO

After filing this statement, **if I decide to raise, accept, or expend funds, or incur liabilities, for a campaign-related purpose, I will immediately notify my local election official in writing**, and will file periodic campaign finance reports according to the statutory filing schedule.

Until such notice is on file with the local election official, I certify that the above Zero report will be in effect for each reporting period, **in the calendar year in which it is filed**, required by Chapter 55 of the Massachusetts General Laws.

**This form is valid through December 31 of the year in which it was signed.**

SIGNED UNDER THE PENALTIES OF PERJURY:

\_\_\_\_\_  
Candidate's signature:

\_\_\_\_\_  
Date:



## INSTRUCTIONS FOR COMPLETING FORM CPF M109

This form is filed by a candidate who only files with their local election official, if:

1. The candidate has not received any contributions;
2. The candidate has not made any expenditures; including with their own funds or personal credit cards;
3. The candidate has not incurred any obligations (liabilities);
4. The candidate does not have a campaign fund in existence; and
5. ~~At~~ The candidate does not have a political committee.

Municipal candidates who file with OCPF, including mayoral candidates, and city council candidates in cities with populations of more than 65,000, are not eligible to submit this form to their local election official.

For assistance, please contact the Office of Campaign and Political Finance at (617) 979-8300 or by e-mail at [ocpf@mass.gov](mailto:ocpf@mass.gov)



THE COMMONWEALTH OF MASSACHUSETTS  
OFFICE OF CAMPAIGN & POLITICAL FINANCE

ONE ASHBURTON PLACE, ROOM 411  
BOSTON, MASSACHUSETTS 02108

MICHAEL J. SULLIVAN  
DIRECTOR

TEL: (617) 727-8352  
(800) 462-OCPF  
FAX: (617) 727-6549

## COMMON ERRORS MADE WHEN COMPLETING CAMPAIGN FINANCE REPORTS

Some errors tend to appear in campaign finance disclosure reports on a regular basis. OCPF has prepared this guide to help local candidates avoid those mistakes on their M-102 reports.

### COVER PAGE

- **Correct dates:** Check with your local city or town clerk or election commission for the correct filing dates and periods covered, which depend on the dates of local elections.
- **Beginning balances:** Line 1 must be the same as Line 5 from your last report.
- **Negative balances:** Lines 1-5 are on a cash based system. Negative balances are possible only if your account is overdrawn.
- **Math errors:** If you are not using OCPF's software, please double check your calculations.
- **Signatures:** Original signatures of the candidate and, in the case of a committee, the treasurer are required.

### SCHEDULE A

- **Date Received:** List the date a contribution was actually received by the committee, not the date of the check or the date it was deposited into the committee's bank account.
- **Contributor information:** Avoid using initials instead of first names. Provide residential addresses.
- **Interest earned:** Report as a receipt. You must account for all money that enters the account, including refunds and any funds provided by the candidate.
- **Occupation/Employer:** If information is not provided by the contributor, you must ask for it in writing within 45 days of receipt. Your report should indicate "Letter Sent" and the date of the letter.
- **Cash/Money Orders:** Contributions by cash and money order are limited to \$50 or less.

### SCHEDULE B

- **Purpose of Expenditures:** Be specific. For example, list "thank you dinner for supporters," not "meals".
- **Candidate expenditures:** Include any personal funds spent by the candidate on behalf of the committee. Failing to include the candidate's own contributions and expenditures could result in a negative balance.
- **Reimbursements:** List the purpose of any reimbursement in addition to the actual recipient. If necessary, use the R-1 form to provide complete vendor/purpose/cost disclosure.

### SCHEDULE D

- **Liabilities:** Report **all** outstanding liabilities, regardless of when incurred, that are still outstanding. If you have not received a bill, report amount as "to be determined."

**PLEASE FILE ON TIME.** Filing on time ensures the required disclosure and also avoids the \$25 per day penalty that may be imposed by law. If you have any questions as you complete your report, we encourage you to contact your local election official or OCPF for assistance.

03/10



The Commonwealth of Massachusetts  
*OFFICE OF CAMPAIGN AND POLITICAL FINANCE*  
**PUBLIC EMPLOYEES AND CAMPAIGNS**

MGL Chapter 55, the campaign finance law, regulates political activity by public employees and the use of public buildings and resources in campaigns. Public employees who take part in political campaigns and the candidates and committees they support should be aware of these sections of the law.

**SECTION 13: Public Employees**

No person employed for compensation by agencies of the Commonwealth, its cities, towns and counties, other than an elected official, may directly or indirectly solicit or receive a contribution or anything of value for any political purpose (e.g., candidates, parties, PACs, ballot question committees).

*A public employee may not:*

- \* sell tickets to a political fundraiser or other wise solicit or collect political contributions in any manner, including in person, by phone, by e-mail, by social media or by conventional mail.
- \* sponsor or host a political fundraising event.
- \* allow his or her name to be used in a fundraising letter, advertisement, social media post, phone call or e-mail.
- \* help identify people to be targeted for political fundraising.
- \* serve as treasurer of a political committee.

*A public employee may:*

- \* contribute to candidates and attend fundraisers.
- \* run for office (an employee must organize a campaign committee if he or she plans to raise money).
- \* work for campaigns and committees in a non-fundraising capacity, such as holding signs, stuffing envelopes, hosting coffees or other meetings, or being a member of a committee.

**SECTION 14: Government Buildings**

Soliciting or receiving campaign contributions in a government building is prohibited. Examples include city and town halls, public schools, libraries, police and fire stations and public works buildings.

*No one (not just public employees) may:*

- \* sell ticket to a fundraiser or otherwise solicit or collect political contributions in a public building.
- \* send a solicitation into a government building, such as by phone, mail or e-mail.
- \* use a public building as the site of a fundraiser, the return address for contributions or the contact phone number for buying tickets to a fundraiser.
- \* post in a public building any advertisement for a fundraiser.

**Use of Public Resources**

Public resources (government vehicles, office equipment, and the paid time of public employees) may not be used for political campaign purposes, such as the election of a candidate or the passage or defeat of a ballot question. For example, a public employee may not, during his or her work day, render campaign service to a candidate or ballot question committee or use office postage or equipment to distribute campaign material.

**\*\*CANDIDATES WHO FILE WITH CITIES OR TOWNS\*\***

# *Are you spending personal funds on your campaign?*

*Here's how to disclose it on your campaign finance report*



Municipal candidates\* who file locally in the non-depository system often make campaign expenditures using their personal funds. When doing so, they are required to disclose the expenditures and contributions on their campaign finance reports (CPF M102 form).

**Step One:** Report the amount spent as a contribution from the candidate to the campaign on Schedule A, even though the money was paid directly to a vendor. If you anticipate being paid back by the committee, write "loan" next to the candidate's name.

**Step Two:** Record the amount as an expenditure, listing the actual vendor in the "To Whom Paid" column on Schedule B (expenditures) with the date, purpose, address and amount. Listing the expenditure balances the account.

**Step Three:** If a candidate anticipates being paid back by the campaign, the contribution information should be listed in the liabilities section of the campaign finance report (Schedule D). Liabilities to a candidate can remain for as long as the committee is open, and may be paid back or forgiven at a future date.

**Example:** Candidate X needs to buy \$1,000 worth of lawn signs but does not have that balance in his campaign account. He uses his personal funds. He will disclose the activity by reporting a \$1,000 contribution to the campaign from himself on the receipts schedule and a \$1,000 expenditure to the lawn sign company on the expenditures schedule. If it is considered a loan to the campaign, he will also list the \$1,000 amount as a loan on the liabilities schedule.

## Exception

If a candidate is reimbursed for out-of-pocket expenditures before the end of the campaign reporting period, he or she should *not follow the steps above*. The campaign finance report would disclose the activity as a reimbursement to the candidate with a corresponding reimbursement form (CPF R1).

**\*Includes all municipal candidates in cities and towns who file campaign finance reports with their municipal clerks or local election officials.**





THE COMMONWEALTH OF MASSACHUSETTS  
OFFICE OF CAMPAIGN & POLITICAL FINANCE  
ONE ASHBURTON PLACE, ROOM 411  
BOSTON, MASSACHUSETTS 02108

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(800) 462 - OCPF  
EMAIL : OCPF@CPF.STATE.MA.US

**M-98-03**

Revised: May 28, 2020

**MEMORANDUM**

TO: Interested Persons  
FROM: OCPF  
SUBJECT: Use of Candidate's Personal Funds for Campaign

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This memorandum reviews questions that candidates ask about making contributions to, and expenditures from, their campaigns using their own personal funds. Candidates may contribute their own personal funds to their campaign and use those funds for campaign purposes in any amount. Certain candidates are limited, however, in how much they may loan to their campaign. Of course, like any contribution, candidate contributions may not be commingled with personal or business accounts.

**I. Contributions and Expenditures by Candidates**

**1. Is there a limit to how much I can contribute to my campaign?**

No. You may contribute to your campaign without limitation.<sup>1</sup> In contrast, individual contributions from others are limited to \$1,000 per calendar year. Contributions from lobbyists, however, are limited to \$200 in a calendar year.

**2. If I use my own money for my campaign, does this have to be disclosed?**

Yes, candidates who file with OCPF generally file in the depository system.<sup>2</sup> This means that they must generally deposit funds into the committee account rather than make expenditures directly, to ensure that expenditures are disclosed by the depository bank.

Municipal candidates who do not file using the depository system disclose out-of-pocket expenditures by reporting (1) a receipt in Schedule A; (2) an expenditure in Schedule B; and, if the candidate intends to be repaid, (3) a liability in Schedule D.

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<sup>1</sup> The spouse of a candidate may also contribute (or loan, subject to the restrictions on candidate loans described in Section II, below) without limitation.

<sup>2</sup> Depository candidates and committees include state, county, and mayoral candidate committees, PACs that file reports with OCPF (other than independent expenditure PACs), state party committees, and committees organized on behalf of candidates for city council in cities with a population of 65,000 or more (currently Boston, Cambridge, Lowell, Springfield, Worcester, New Bedford, Brockton, Quincy, Lynn, Fall River, Newton, Lawrence, Somerville, and Framingham). See M.G.L. c. 55, § 19. The only candidates that file with OCPF who are not in the depository system are candidates for Barnstable Assembly of Delegates.

**3. If I am paying for campaign expenses, do I need to organize a political committee?**

No. If you are employed for compensation by the commonwealth or any of its subdivisions, however, you would be prohibited from political fundraising. *See* M.G.L. c. 55, § 13. If you are a public employee subject to Section 13, you must (unless you use only your own funds for your campaign) organize a political committee to solicit and receive contributions on your behalf.

**II. Loans by Candidates to the Candidate's Campaign**

A candidate may make a contribution in the form of a loan to his or her campaign. If a candidate loans funds to the campaign, the campaign may subsequently repay the candidate. The amount of a candidate loan, however, is restricted for some candidates. It is important for candidates and treasurers to remember that a loan is also considered a contribution.<sup>3</sup>

**1. Do I have to report loans I make to my campaign, and if so, how?**

Candidates who file with OCPF disclose a loan to the committee on a deposit report and select “candidate loan” from the drop-down menu when reporting the deposit. The loan will be listed as a liability of the campaign on the Liabilities schedule of the year-end campaign finance report, which is e-filed each year on January 20.<sup>4</sup>

Local candidates who do not file with OCPF report a loan as a contribution on Schedule A of the campaign finance report, Form M102. The report should note clearly on Schedule A that the contribution was made as a loan to the campaign. In addition, the loan should be reported as a liability of the campaign on Schedule D of the report. *See* Example.

**Example: Form CPF M102 (Local Candidate Disclosure of Candidate Loan)**

**Schedule A: Receipts**

<b>Date Received</b>	<b>Name and Residential Address (alphabetical listing required)</b>	<b>Amount</b>	<b>Occupation &amp; Employer (for contributions of \$200 or more)</b>
<b>9/4/20</b>	<b>Candice Candidate (loan to committee) 101 Memory Lane Anytown, MA 01234</b>	<b>\$2,500</b>	<b>Computer Programmer ISR Company</b>

<sup>3</sup> The campaign finance law defines “contribution” to include all loans, except bank loans made in the ordinary course of business. *See* M.G.L. c. 55, §1. Although loans from candidates to their committees are therefore “contributions,” not all contributions are loans. For a contribution to be considered a loan, it must be disclosed as such on campaign finance reports filed by the candidate.

<sup>4</sup> Candidates for the Barnstable Assembly of Delegates, although they file their campaign finance reports with OCPF, are not in the depository system. Therefore, they disclose the receipt and repayments of candidate loans in the same manner as local candidates, as described below, although electronically via OCPF’s web-based reporting software.

**Schedule D: Liabilities**

<b>Date Incurred</b>	<b>To Whom Due</b>	<b>Address</b>	<b>Purpose</b>	<b>Amount</b>
<b>9/4/20</b>	<b>Candice Candidate</b>	<b>101 Memory Lane Anytown, MA 01234</b>	<b>Candidate Loan</b>	<b>\$2,500</b>

**2. Is there any limit to the amount which I may loan my campaign?**

Yes, for some offices. The amount a candidate may loan his or her campaign per election<sup>5</sup> is limited for certain candidates as follows:

Governor	\$200,000	Lieutenant Governor	\$200,000
Secretary of State	\$150,000	Treasurer	\$150,000
Auditor	\$150,000	Attorney General	\$150,000
State Senator	\$50,000	State Representative	\$30,000

All other candidates, including candidates running for county or municipal office, may make loans to their campaigns without limitation. Since loans are treated as contributions, however, loans from other individuals (except the candidate's spouse) are limited to \$1,000 per calendar year (\$200 for lobbyists).

**3. How do I report repayment of a loan?**

Candidates who file with OCPF are issued a check from their committee with a notation in the "memo" line of the check stating "candidate loan repayment." The candidate then selects "Candidate Loan Repayment" on the Liabilities schedule of the year-end report.

Local candidates who do not file with OCPF report the loan repayment as an expenditure on Schedule B and also reduce the liability on Schedule D, of the report covering the period in which the repayment takes place.

**4. What if I decide to dissolve my committee and the committee has never repaid the loan to me?**

If you do not have funds remaining in your campaign account, or if you use remaining funds for other campaign purposes, you may "forgive" the loan obligation by selecting "Loan Forgiveness" on the liability schedule of the dissolution report. When "Loan Forgiveness" is selected, the R7 software automatically includes the amount forgiven as an in-kind contribution.

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<sup>5</sup> The phrase "per election" includes each regular or special primary or general election. For example, a candidate for state senate may loan his or her committee \$50,000 between the previous November election and the following September primary and another \$50,000 between the September primary and the following November election, for a total of \$100,000.

M-98-03

Revised: May 28, 2020

Page 4

Municipal candidates who file locally disclose an in-kind contribution on Schedule C, and a loan forgiveness on Schedule D.

For further information and guidance regarding this memorandum, please contact OCPF at (617) 979-8300.





**TOWN OF FREETOWN**  
**MASSACHUSETTS**  
*Office of the Town Clerk*

3 North Main Street  
P.O. Box 438  
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[www.freetownma.gov](http://www.freetownma.gov)  
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Cheryl C.A. Estrella, CMC  
*Town Clerk*

Timmothy J. McIntosh  
*Assistant Town Clerk*

**Political Sign Policy**

Please take notice that signs cannot be erected on Town or State property. They must be placed only on private property. Signs should be placed approximately eight (8) feet back from road asphalt, as that is the edge of public/private property in most cases.

- Please do not erect signs sooner than 30 days before election. (*Article 11.20D, Section 5b*)
- Signs should not exceed 6 square feet in area and not exceed 40 inches in length or 36 inches in width. (*Article 11.20D, Section 5b, Subsection C*)
- Please remove signs within 7 days following an election. (*Article 11.20D, Section 5b*)

If signs are placed in the roadway or on public property they could be removed. Your anticipated cooperation is appreciated.

Thank you.